

PDF Generator - Feature Guide - Internal

PDF Generator - Feature Guide - Customer FAQ.

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Introduction

Customers may require you to provide custom-formatted PDF forms to meet contractual requirements. The PDF Generator feature streamlines this process by automatically populating a customized PDF template with the technician's responses after a workflow is completed in the web or mobile app. The generated PDF is then attached to the workflow, centralizing job site information in XOi and eliminating redundant data entry.

Feature Requirements

- This feature is only available to clients on the **Premium Package**.
- **Multiple Workflows Per Job** must be enabled. Your Customer Success Manager can activate this feature.
- Requires mobile app version **1.92.0** or higher.
- **Only supported for organizations with [Dataplate Enhancements](#) enabled**. If this feature is not enabled, PDFs may be generated without MMS values populated as results may not be available at the time of generation.

How to Configure

Only [Admins](#) can create PDF Templates in [Vision Web](#).

1. Enable Fill PDF Generation

- Go to Vision Web Administration > **Workflows**.
- Edit or Create a New Workflow.
- Go to the **Fill PDF Template with Workflow Steps** section on the workflow.
- Toggle **PDF Fill Workflow** to "Enabled" (blue).

Work Summary
Require an AI Generated or manually written summary to complete this workflow
 Require Work Summary

Workflow Visibility
When enabled, this workflow will not be displayed for selection in the Select Workflow list on a job
 Hide From Technician's Workflow List

Fill PDF Template with Workflow Steps
Any time this workflow is completed, a copy of the PDF will be generated with the mapped workflow steps embedded.
 PDF Fill Workflow

Drop Your PDF or click to browse
5 MB max

Workflow Steps

Step Name	Content Usage	Content Requirements	Post-Processing	Miscellaneous	Reporting Category	Actions
You must add at least one step before creating a workflow.						

Reporting Category

Journeyman Options
 Show In Journeyman Results List
 Show In Workflow List When Taking Action On An Opportunity

Step Templates Add Step

2. Upload PDF Template

- Choose the PDF template you want to use and upload it here.

- i. The file must be a PDF.
- ii. The file size must be 5MB or less.
- iii. The PDF does not need to be fillable.

Step Name	Mapped to PDF	Content Usage	Content Requirements	Post-Processing	Miscellaneous	Reporting Category	Actions
Image of dataplate	✗	Share content		Dataplate extraction		Other	Edit Delete
What is the unit id or name?	✗	Share content	Short Response required			Other	Edit Delete
Was the unit operating on arrival?	✗	Share answer	Yes / No required			Other	Edit Delete
What was the root cause of the problem?	✗	Share answer	Multiple Choice required			Other	Edit Delete

*Note: A new column will be added to the Workflow Steps table called **Mapped to PDF**.*

3. Create a [Workflow Step](#) for each PDF Field

- To populate a PDF with data, a corresponding workflow step is needed for each field to ensure XOi maps the correct information. The step type should match the data format needed in the PDF.
 - i. For example, if your PDF includes a field for “**Service Recommendations & Notes,**” create a **Short Text** workflow step so users can enter the necessary information in XOi.
- Use the [field mapping section](#) to determine the best step type for each field.
 - i. You **do not** need to build steps for [always available fields](#).
 1. Workflow Completed Date
 2. Workflow Owner
 3. Customer
 4. Location
 5. Work Order #
 - ii. Fields that cannot be mapped are:
 1. Notes
 2. Images & Videos

3. Ai Work Summaries
4. Numeric Units (i.e. volts)

4. [Map Steps to PDF](#)

- Click "**Map Steps to PDF Template**" to match your workflow steps with the fields in your PDF.

Workflow Visibility
When enabled, this workflow will not be displayed for selection in the Select Workflow list on a job

Hide From Technician's Workflow List

Fill PDF Template with Workflow Steps
Any time this workflow is completed, a copy of the PDF will be generated with the mapped workflow steps embedded.

PDF Fill Workflow

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Generic PDF Template Example (1).pdf
50 KB • Complete

Workflow Steps

Step Name	Mapped to PDF	Content Usage	Content Requirements	Post-Processing	Miscellaneous	Reporting Category	Actions
Voltage	×					Other	Edit Delete
Number of Circuits	×					Other	Edit Delete
Image of Dataplate	×			Dataplate extraction		Other	Edit Delete
Year Manufactured	×					Other	Edit Delete
Unit Condition	×					Other	Edit Delete

[Map Steps to PDF Template](#) [Step Templates](#) [Add Step](#)

Reporting Category

- A new window will open with the PDF on the left and the workflow steps to be matched on the right. The steps and their step types in the workflow will determine how the workflow data can be mapped to the PDF. Review the list of [step types](#) below to determine which is best for each use case.

Map Steps to PDF Template
Star Wars Coffee HVAC Maintenance Form 2023 - Sample.pdf

[Discard changes](#) [Save and close](#)

Star Wars Coffee HVAC Maintenance Checklist
Please complete and email to bob@starwarscoffee.com within 10 days of service.

Location: _____ Technician: _____
Service Order #: _____ Date: _____
Make: _____ Model: _____ Serial: _____

Was the burglar alarm set when you entered? ___ yes ___ no ___ n/a
Verify equipment operating efficiency. Report any issues found.

Workflow Data
Drag and drop the fields below to the location on the PDF where it should populate when the PDF is generated.
Not all of the fields need to be added to the PDF for the PDF to be generated.

Optional fields

- Workflow Completed Date [+](#)
- Workflow Owner [+](#)
- Location [+](#)
- Customer [+](#)
- Work Order # [+](#)
- Unit Name - Image of dataplate [+](#)

- Drag and drop the workflow steps on the right into their respective locations on the PDF form. Steps can be placed anywhere within the PDF and can be added more than once.

Note: For a PDF field to be filled, it must have an associated workflow step.

Map Steps to PDF Template
Generic PDF Template Example (1).pdf

Discard changes Save and close

HVAC Equipment Form

Please email this completed form to customer@gmail.com

Location:

Work Order #:

Manufacturer: Year Manufactured:

Model No: Serial No:

Workflow Data

Drag and drop the fields below to the location on the PDF where it should populate when the PDF is generated.

Not all of the fields need to be added to the PDF for the PDF to be generated.

Optional fields

- Voltage +
- Voltage - 208/230-1-60 ✓ +
- Voltage - 208/230-3-60 ✓ +
- Voltage - 460-3-60 ✓ +
- Number of Circuits ✓ +

5. Save Your Work

- Click the **“Save and close”** button to save your step to PDF mappings. Any unsaved changes will be lost.



- The Last Updated date and time of the PDF will be updated to reflect the last time when a PDF Template was uploaded or step mapping was updated.

Fill PDF Template with Workflow Steps

Any time this workflow is completed, a copy of the PDF will be generated with the r

PDF Fill Workflow

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Roof Safety Form.pdf

80 KB • Complete

6. Double Check Step Mapping

- Review the Mapped to PDF column in the Workflow Steps table to verify your mappings look as expected.
 - A green check indicates that the step has been mapped.
 - A red X indicates that this step is not mapped to the PDF.

Workflow Steps			
Step Name	Mapped to PDF	Content Usage	C R
Image of Dataplate	✗		
Check unit safety devices	✓		

Note: You are not required to map every workflow step to the PDF.

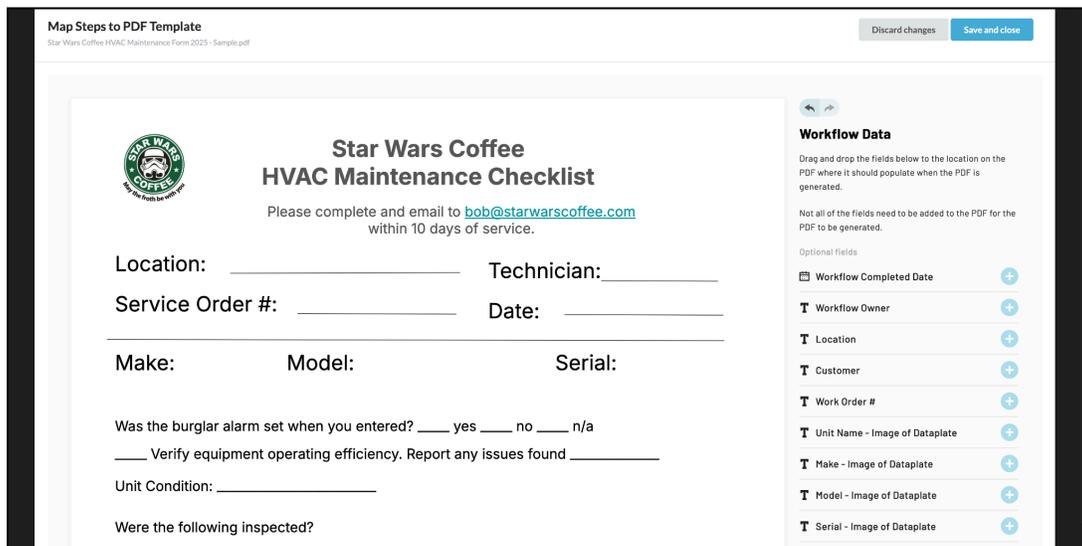
7. Save your Workflow

- To keep any changes made in the Map Steps to PDF Template editor, save the workflow. **Unsaved changes will be lost.**
- Once you press save, a PDF icon will appear on the workflow title in the main workflow screen.



Map Steps to PDF Template Editor Functionality

The **Map Steps to PDF Template page** allows you to define how step data is placed onto a generated PDF for each completed workflow. The template editor's side panel contains your workflow data, which are the workflow steps you have configured. The workflow steps and their step types determine how the workflow data can be mapped to the PDF.



Adding Fields to the PDF Template

There are two ways to add fields to the PDF template:

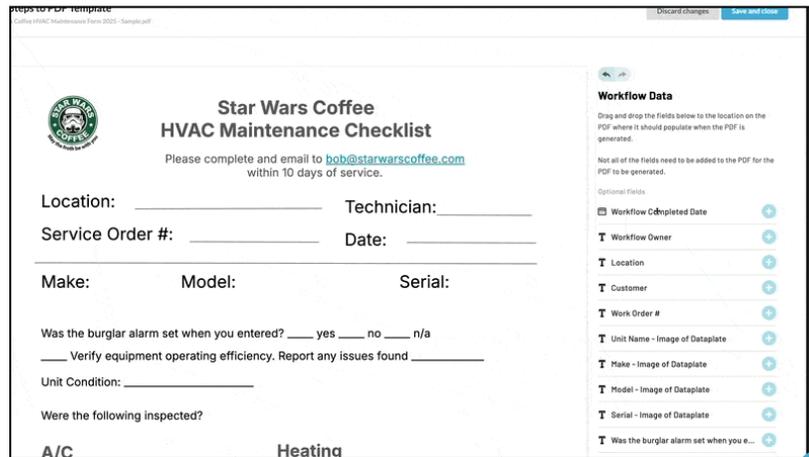
1. Drag & Drop

- Click and hold the name of the desired field from the field list in the side panel.

- Drag the field onto the specific location within the PDF template where you want it to appear.
- Release the mouse button to drop the field.

2. Plus Icon

- Click the plus button  next to the desired field from the field list in the side panel.
- The field will be placed on the PDF in a default location. Scan the PDF template to find the newly added field.
- You can then click and drag the field to the desired location.



The screenshot shows a PDF template editor interface. The main area displays a form titled "Star Wars Coffee HVAC Maintenance Checklist". The form includes fields for "Location:", "Technician:", "Service Order #:", "Date:", "Make:", "Model:", and "Serial:". There are also checkboxes for "Was the burglar alarm set when you entered?" and "Verify equipment operating efficiency. Report any issues found". A "Unit Condition:" field is present, and a section titled "Were the following inspected?" lists "A/C" and "Heating". On the right side, there is a "Workflow Data" panel with a list of fields to be added to the PDF, each with a plus icon. The fields are: "Workflow Completed Date", "Workflow Owner", "Location", "Customer", "Work Order #", "Unit Name - Image of Dataplate", "Make - Image of Dataplate", "Model - Image of Dataplate", "Serial - Image of Dataplate", and "Was the burglar alarm set when you e...".

You can place steps anywhere within the PDF Template and add them multiple times if needed.

Added fields have a checkmark  that appear next to the field name in the list, confirming it has been successfully placed onto your PDF.

Adjusting Field Position and Size

After dropping the field, you may need to fine-tune its position and size.

3. Click and drag the field to reposition it.
4. Use the resize handles (small squares at the corners of the field) to adjust its dimensions.
5. NOTE: Pay close attention to alignment and spacing. If the field is the wrong size, the text that is added to the PDF later may overflow, or look bad.

Technician: _____	
#: _____	
Model: _____	Serial: _____

Mapping a Field Too Small

ed? ____ yes ____ no ____ n/a
 y. Report any issues found 

PDF Output

ed? ____ yes ____ no ____ n/a
 y. Report any issues found 

Example of short text field where the space was too small so the text overflows.

Remove Fields

To remove a field, first select it on the PDF. Then, you can either click the X  icon or the delete key on your keyboard.

 Check unit safety devices 

Undo/Redo Actions

The editor provides both Undo and Redo buttons, along with keyboard shortcuts, to reverse and reapply, adding, deleting, moving, or resizing in your PDF template.



Workflow Data

Drag and drop the fields below to t
 PDF where it should populate wher

Swap Mapped Fields

If you map the wrong field, you don't need to delete and re-add it. Simply click on the field, and use the dropdown in the right-side panel to select the correct one

The screenshot shows a PDF form for 'Star Wars Coffee HVAC Maintenance Checklist'. The form includes fields for Technician, Order #, Date, Model, and Serial. A sidebar titled 'Workflow Data' contains a list of optional fields: Workflow Completed Date, Workflow Owner, Location, Customer, Work Order #, and Step 1. Each field has a plus icon next to it.

The screenshot shows a dropdown menu for selecting a field. The menu is titled 'Choose a field' and lists the following options: Workflow Completed Date, Workflow Owner, Location, Customer, Work Order #, and Unit Name - Image of Dataplate. The 'Workflow Owner' option is currently selected.

Mappable Fields

Always Available Fields (No workflow steps needed)

Regardless of the workflow steps, these fields are always available for mapping to the PDF:

- A date field  for Workflow Completed Date
 - The mapping will display the completed date formatted as MM-DD-YYYY
- A text field  for Workflow Owner
 - The mapping will display the name of the user assigned to the workflow
- A text field  for Customer
- A text field  for Location
- A text field  for Work Order #

 Workflow Completed Date	
 Workflow Owner	
 Location	
 Customer	
 Work Order #	

Dataplate Steps

["Extract Dataplate" option must be enabled on the step.](#) This allows mapping of the first dataplate's fields:

- Step Name - Unit Name
- Step Name - Make
- Step Name - Model
- Step Name - Serial
 - If multiple pieces of equipment are added to the step, only the first one is mapped.

Note: Images and videos cannot be embedded in the PDF at this time.

Yes/No Steps

There are multiple ways to map **Yes/No** checkboxes, depending on the PDF form's checkbox format:

 Verify equipment operating efficiency	
<input checked="" type="checkbox"/> Yes - Verify equipment operating effi...	
<input checked="" type="checkbox"/> No - Verify equipment operating effici...	

- **Separate checkboxes for "Yes" and "No"** → Drag the "Yes" response to the "Yes" box and the "No" response to the "No" box.
 - The box will be checked based on the answer.

Make:	Model:	Serial:
Was the burglar alarm set when you entered? <input type="checkbox"/> yes <input type="checkbox"/> no ____ n/a		
____ Verify equipment operating efficiency. Report any issues found _____		

- **Single checkbox for “Yes” only** → Drag only the “Yes” response to that box.
 - It will be checked if the answer is “Yes” and remain unchecked if the answer is “No.”

Was the burglar alarm set when you entered? ____ yes ____ no ____ n/a
<input checked="" type="checkbox"/> Verify equipment operating efficiency. Report any issues found _____

- **Short text field** **requiring “Yes” or “No”** → Drag the short text field to the PDF field.
 - The words “Yes” or “No” will display based on the answer.

Was the burglar alarm set when you entered? <input type="checkbox"/> yes <input type="checkbox"/> no ____ n/a
<input type="text"/> Verify equipment operating efficiency. Report any issues found _____
Unit Condition: _____

Multiple Choice Steps

There are multiple ways to map Multiple Choice checkboxes, depending on the PDF form’s checkbox format:

<input type="text"/> Unit Condition	<input type="button" value="+"/>
<input checked="" type="checkbox"/> OK - Unit Condition	<input type="button" value="+"/>
<input checked="" type="checkbox"/> Fair - Unit Condition	<input type="button" value="+"/>
<input checked="" type="checkbox"/> Good - Unit Condition	<input type="button" value="+"/>

- **Separate checkboxes** **for each choice** → Drag each response to its corresponding checkbox.
 - The boxes will be checked as the choices are selected.

A/C

Filter Area

- Air Filters
- Economizer Screen
- Evaporator Coils

- **Short text T field (for multiple choices)** → Drag the step name text field to the PDF field. If multiple options are selected, they will appear as a comma-separated list in the textbox.

Unit Condition: T The following parts presented concerns.

Note: In cases when users should only provide one answer for a multiple choice step, be sure to leave the **Allow more than one answer to be provided** toggle DISABLED on the workflow step.

Multiple Choice Usage

Share answer with customers and other external viewers

Allow more than one answer to be provided

Numeric Steps

A numeric field .1 labeled with the step name will pass over the numeric answer provided, not the units.

.1 Incoming Voltage - L1 +

For example, if the answer provided is 32 Volts, just the number 32 will pass over.

Short Text Steps

A text field T labeled with the step name will pass over the text response entered by the user. You can map multiple short text steps to one field on the PDF.



Note: If the mapped field area is too small, the text may overflow. See [Adjust Field Position and Size](#)

Date Steps

- A date field  labeled with the step name will pass over the date formatted as MM-DD-YYYY.



Things to Keep in Mind

- **AI Work Summaries:** Cannot be mapped to the PDF.
- **Step Notes:** Cannot be mapped to the PDF.
- Workflows with over 150 steps cannot be mapped to a PDF.
-  Changing a step type on an existing step will break any mappings to the PDF.
-  Changing a step name on an existing step will break any mappings to the PDF.
- **Changes to PDF Mappings Affect Future PDFs Only:** Please note that editing the [PDF mappings](#) will not change the content of PDFs that have already been generated. The PDF content is based on the workflow at the time of generation. Changing the mapping changes how future PDFs are created, not existing ones. Therefore, previously generated PDFs will not reflect any mapping updates.

Turning Off PDF Generation

There are two ways you can turn off the PDF Generation:

1. **Disable the *PDF Fill Workflow Toggle* in the Workflow**
 - a. Saves your mappings and existing configurations but will stop generating PDFs on a workflow as soon as the workflow is saved.

Hide From Technician's Workflow List

Fill PDF Template with Workflow Steps
Any time this workflow is completed, a copy of the PDF will be generated with the mapped workflow steps embedded.

PDF Fill Workflow

Workflow Steps

Step Name	Content Usage	Content Requirements	Post-Processing	Miscellaneous
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Disable PDF Generation?

If you continue, when this workflow is completed on a job a PDF will no longer be created. Do you want to continue?

Cancel **Disable PDF** ✓

2. **Delete the PDF Template** - Removes the PDF. You will have to remap it if you add it back.

- a. Click the trash icon  next to the uploaded PDF document.

When enabled, this workflow will not be displayed for selection in the Select Workflow list on a job.

Hide From Technician's Workflow List

Fill PDF Template with Workflow Steps
Any time this workflow is completed, a copy of the PDF will be generated with the mapped workflow steps embedded.

PDF Fill Workflow

Last Updated on Mar 28, 2025

Star Wars Coffee HVAC Maintenance Form 2025 - Sa... 

75 KB

Workflow Steps

Step Name	Mapped to PDF	Content Usage	Content Requirements	Post-Processing
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Delete PDF Template?

This will undo any mapping that has been done to this PDF. This action cannot be undone. Do you want to continue?

Cancel **Delete PDF** ✓

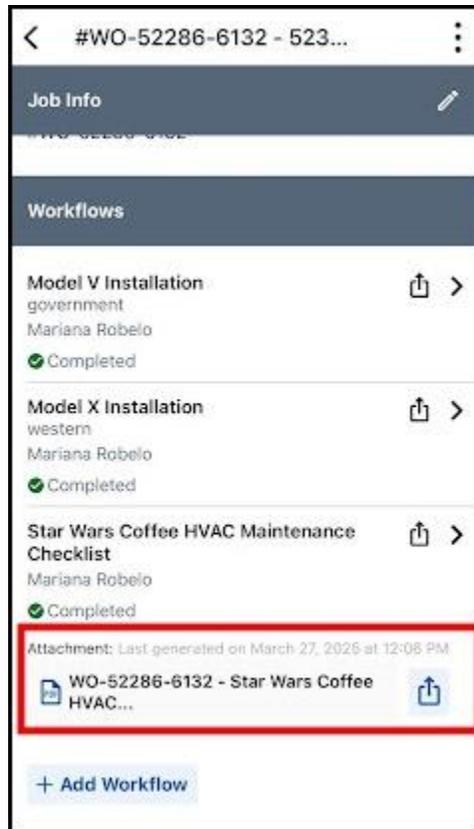
Accessing the Generated PDFs

PDF Generation

When a workflow with the PDF Fill Workflow toggle enabled is completed on a job, PDF generation will begin automatically.

- The PDF output will be based on the [Map Steps to PDF Template Editor](#) configuration and the step responses provided for the workflow.

- PDFs can take anywhere from 30 seconds to 5 minutes to finish generating.
- If a user is offline, the PDF will begin generating automatically once they return online.
- PDF file name format will always be: Work Order # - Workflow Name - PDF Generated Timestamp



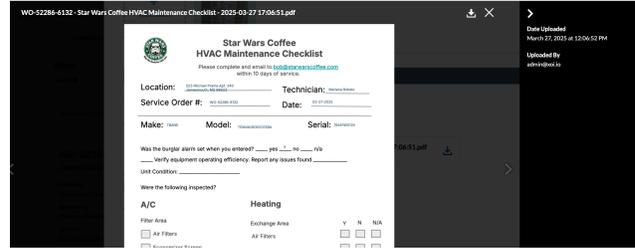
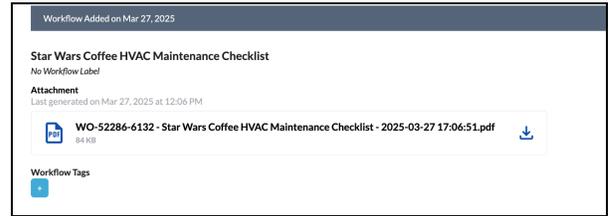
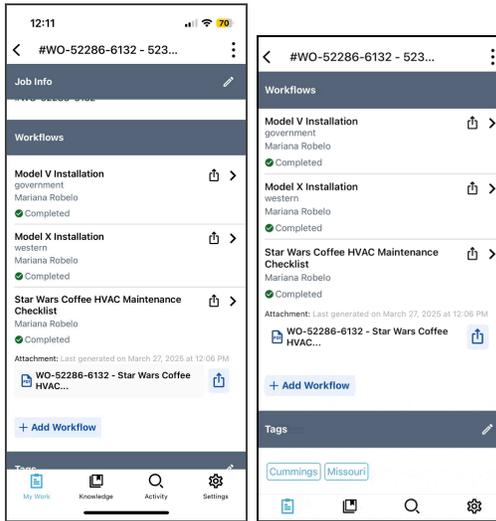
Viewing the Generated PDF

When a workflow with the PDF Fill Workflow toggle enabled is added to a job, you will see an **Attachment section** underneath the workflow name on the view job screen.

Click on the area with the PDF title to view the PDF in the document viewer.

Viewing Generated PDF in Mobile

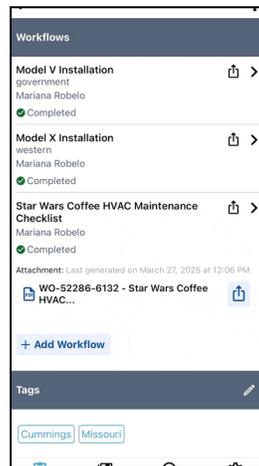
Viewing Generated PDF in Web



Download the Generated PDF

To download a filled PDF, find the PDF in the Attachments section of the job.

- On Mobile, tap on the export icon  next to the PDF name. This will open a list of destinations and applications where you can export the file. Use this to select how you want to share or save your exported PDF file.



- On Web, click the download icon  next to the PDF name. The document will begin to download.



Edit a Generated PDF

To ensure the PDFs always reflect the latest information, XOi automatically regenerates a PDF when you edit a linked step answer. The new PDF, with your edits, replaces the old one in the Attachment section. Older versions will not be updated.

Note: XOi only stores the most recent version. Any previously downloaded PDFs will not be updated.

Sharing a Generated PDF (Manual Only)

Filled PDFs require manual sharing. You must log into XOi to download them for manual sharing via email, text, or other methods.

Generated PDFs are **NOT**

- included in the standard XOi share page, share links, or shared PDF
- passed through any integrations
- included in any workflow notifications

Offline Functionality

PDF generation is not supported while the technician is offline.

If a workflow is completed while offline, the PDF will be automatically generated once the technician regains an internet connection - the app need not remain open.

Searching

The PDF itself is not directly searchable in the mobile app or web, but users can search for the related workflow or job.

Duplicating Workflows

When duplicating a workflow, any existing PDFs and their mapping will NOT carry over to the new workflow.

Access to PDF Workflows through Affiliate Organizations

When an affiliate organization is viewing an affiliated workflow with the PDF Template Enabled, the PDF Fill Workflow Toggle section is read only. Affiliated organizations cannot make updates to the PDF, mappings or any other PDF related changes. Changes must be made through the organization affiliated workflow.

Fill PDF Template with Workflow Steps

Any time this workflow is completed, a copy of the PDF will be generated with the mapped workflow steps embedded.



PDF Fill Workflow

Servman, Jonas, or Legacy K2A & IFS World clients

If you utilize an integration that allows you to link completed XO_i Jobs back to a Work Order (Legacy Integrations) the following fields will not populate in the generated PDF until the job is linked. The PDF will regenerate and populate the fields once the job is linked.

- Customer
- Location
- Work Order #

FAQs

Q: Does this create a workflow for me?

A: No, you must have existing steps on a workflow to use this feature.

Q: Can I map the same workflow step to multiple fields in the PDF?

A: Yes, a step can be mapped as many times as needed on the PDF

Q: What happens if I accidentally map the wrong field? How do I remove a mapping?

A: The mapping can be removed by clicking on the right-hand X button in the Map Steps to PDF Template Editor.

Q: Can I generate a PDF Share Link?

A: Unfortunately, at this time PDFs can be viewed in XO_i or downloaded from XO_i, but no shared links can be generated for external users to view the content. Users can share the content itself.

Q: Is there a limit to the number of mappings per PDF?

A: No, however, a workflow cannot be mapped if it has over 150 steps.

Q: Can I map step notes?

A: No, since step notes are not a step type. In order to get written information into the PDF use the [short text](#) step type.

